

WHAT IS CLAIMED IS:

1. A method of screening companies for investment, the method comprising:  
identifying a plurality of candidate companies;  
obtaining philanthropy data relating to each of the plurality of companies;  
quantifying the philanthropy data for each of the plurality of companies according to at least one philanthropy parameter; and  
selecting at least two companies from the plurality of candidate companies based on the at least one philanthropy parameter so as to create a set of companies for investment.
2. The method as recited in claim 1 wherein the at least one philanthropy parameter is a single philanthropy parameter and wherein the selecting is performed based solely on the single philanthropy parameter.
3. The method as recited in claim 1 further comprising purchasing at least one security associated with each of the companies in the set of companies for investment.
4. The method as recited in claim 1 further comprising selecting at least one security associated with each of the companies in the set of companies for investment for inclusion in a corporate responsibility fund benchmark.
5. The method as recited in claim 4 further comprising calculating a benchmark value for the corporate responsibility fund benchmark by taking a relative percentage of a market value of each security in the benchmark.
6. The method as recited in claim 5 further comprising tracking the benchmark value over time so as to obtain historical benchmark value information.

7. The method as recited in claim 6 further comprising comparing the benchmark value to a second benchmark of securities.
8. The method as recited in claim 7 wherein the second benchmark of securities is selected from the group consisting of the S&P 500® Index, the Dow Jones Industrial Average®, and the NASDAQ Composite® Index.
9. The method as recited in claim 1 wherein the at least one philanthropy parameter includes a first philanthropy parameter defined as a philanthropic contribution amount contributed by the respective candidate company over a predetermined time period.
10. The method as recited in claim 9 wherein the predetermined time period is one of a single year, two years, or three years.
11. The method as recited in claim 10 wherein the selecting includes selecting at least two companies having a philanthropic contribution amount greater than a threshold contribution amount.
12. The method as recited in claim 9 wherein the at least one philanthropy parameter includes a second philanthropy parameter defined as a ratio of the first philanthropic parameter to a performance indicator of the respective candidate company over the predetermined time period.
13. The method as recited in claim 12 wherein the performance indicator includes a net earnings before taxes of the respective candidate company during the predetermined time period.
14. The method as recited in claim 13 wherein the predetermined time period is a recent 3-year period.

15. The method as recited in claim 12 wherein the selecting includes selecting at least two companies having a second philanthropy parameter greater than a predetermined ratio.
16. The method as recited in claim 1 further comprising assigning an industry sector indicator to each of the plurality of candidate companies, and wherein the selecting is based on the at least one philanthropy parameter and on the industry sector indicator of each of the candidate companies.
17. The method as recited in claim 1 further comprising ranking the companies in the set of companies according to the at least one philanthropy parameter.
18. The method as recited in claim 17 wherein the selecting includes selecting the at least two companies according to the ranking.
19. The method as recited in claim 1 wherein the at least one philanthropy parameter includes a first philanthropy parameter and a second philanthropy parameter and further comprising assigning a first weighting factor to the first philanthropy parameter and a second weighting factor to the second philanthropy parameter, and wherein the selecting is performed taking into account the first and second weighting factors.
20. A method for creating a corporate responsibility fund benchmark of securities, the method comprising:
  - identifying a first set of companies, each of the companies associated with a security;
  - obtaining philanthropy data for each of the companies;
  - quantifying the philanthropy data according to at least one philanthropy parameter;
  - selecting a plurality of companies from the first set of companies based on the at least one

philanthropy parameter so as to create a second set of selected companies; and  
creating a corporate responsibility fund benchmark including at least one security of each  
of the companies in the second set of selected companies.

21. The method as recited in claim 20 further comprising calculating a benchmark value based on a price of each security in the benchmark.
22. The method as recited in claim 21 wherein the calculating includes taking a relative percentage of a market value of each security in the benchmark.
23. The method as recited in claim 21 further comprising tracking the benchmark value over time.
24. The method as recited in claim 21 further comprising comparing the benchmark value with a value of a second benchmark of securities.
25. A method for creating a corporate responsibility fund set of securities, the method comprising:
  - identifying a first set of companies, each of the companies associated with a security;
  - assigning a first philanthropy score to each company in the first set;
  - assigning a second philanthropy score to each company in the first set;
  - selecting a at least two companies based on the first and second philanthropy scores so as to create a second set of companies for investment; and
  - selecting at least one security from each of the companies in the second set for inclusion into the corporate responsibility fund set of securities.
26. The method as recited in claim 25 wherein the selecting includes selecting at least two

securities when the first philanthropy score exceeds a first threshold score or the second philanthropy score exceeds a second threshold score.

27. The method as recited in claim 25 wherein the first philanthropy score is a function of a philanthropy contribution amount contributed by the respective company over a predetermined time period.

28. The method as recited in claim 27 wherein the second philanthropy score is a function of a ratio of the first philanthropy score to a performance indicator the respective company during the predetermined time period.

29. The method as recited in claim 28 wherein the performance indicator is a pre-tax net earnings.

30. A computer readable medium having stored thereon computer executable process steps operative to perform a method for selecting a set of securities for investment, the process steps comprising:

- receiving a list of a first set of companies;
- receiving a first philanthropy score corresponding to each of the companies in the first set;
- receiving a second philanthropy score corresponding to each of the companies in the first set;
- comparing the first philanthropy score for each of the companies in the first set to a first threshold score;
- comparing the second philanthropy score for each of the companies in the first set to a second threshold score; and
- selecting a company for inclusion in the set of companies for investment when either the

first philanthropy score for the company exceeds the first threshold score or the second philanthropy score for the company exceeds the second threshold score.

31. The computer readable medium as recited in claim 30 wherein the first philanthropy score is a philanthropic contribution amount contributed by the respective company during a predetermined time period.

32. The computer readable medium as recited in claim 31 wherein the second philanthropy score is a ratio of the first philanthropy score to a performance indicator of the respective company during the predetermined time period.